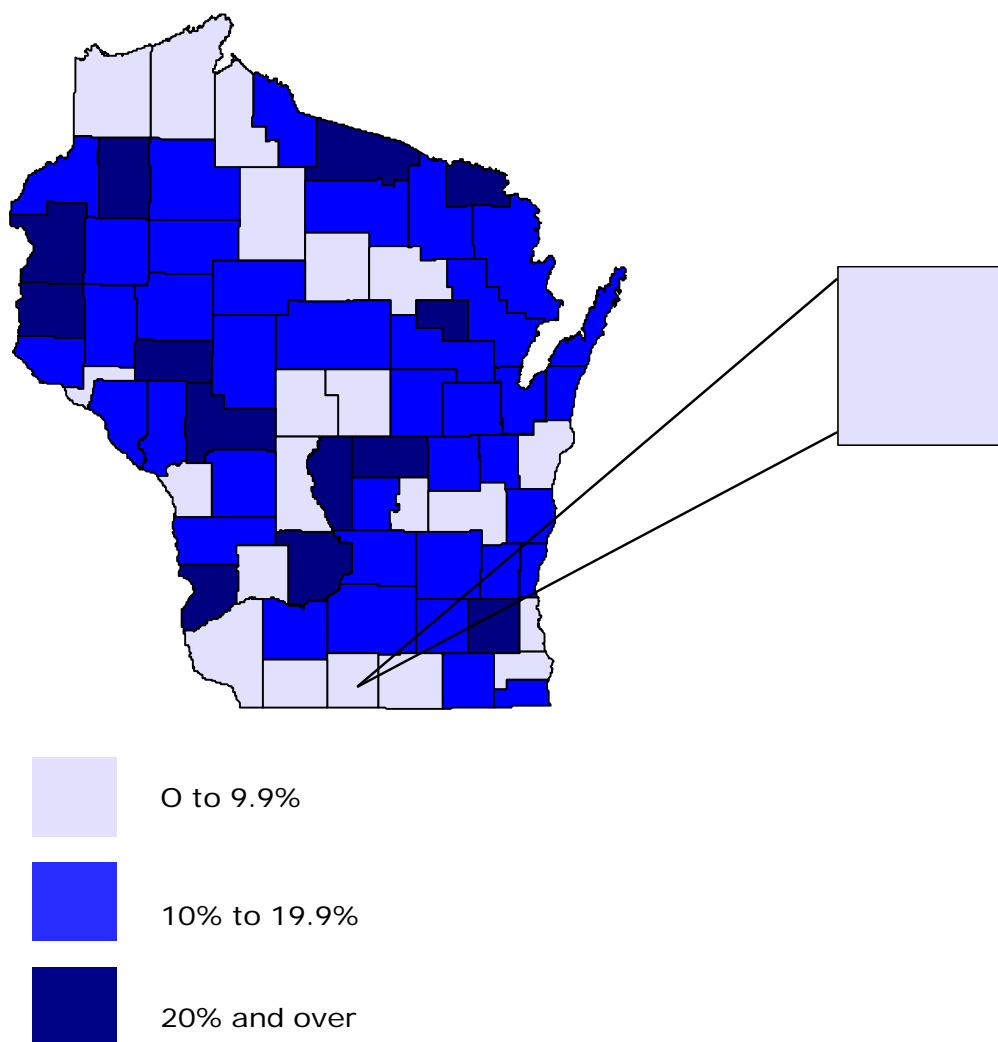


Green County Workforce Profile

Job Growth 1994 to 1999



Wisconsin Department of Workforce Development
Division of Workforce Solutions
Bureau of Workforce Information
October 2001



State of Wisconsin
Department of Workforce Development

Introduction

The County Workforce Profile has been developed by the Wisconsin Department of Workforce Development's (DWD) Bureau of Workforce Information (BWI) to provide a broad overview of Green County's labor market. The data included in this fourth year of publication is for 1999 to maintain consistency with the previous publications and to provide the user with a single year of reference in order to draw comparisons and form a picture of related labor force and employment information.

A variety of economic and demographic labor market information have been provided to describe the current labor market conditions in the counties and regions of Wisconsin. That information includes 1999 data on population, labor force, industries, employment, wages and income. The narrative describes how local conditions have changed over one-year and five-year intervals. Although population information is available from the 2000 census, it is not included in this publication since the period of time selected for all data sets is 1999. For more recent releases of information please consult the Wisconsin Department of Workforce Development Labor Market Information website: <http://www.dwd.state.wi.us/lmi>.

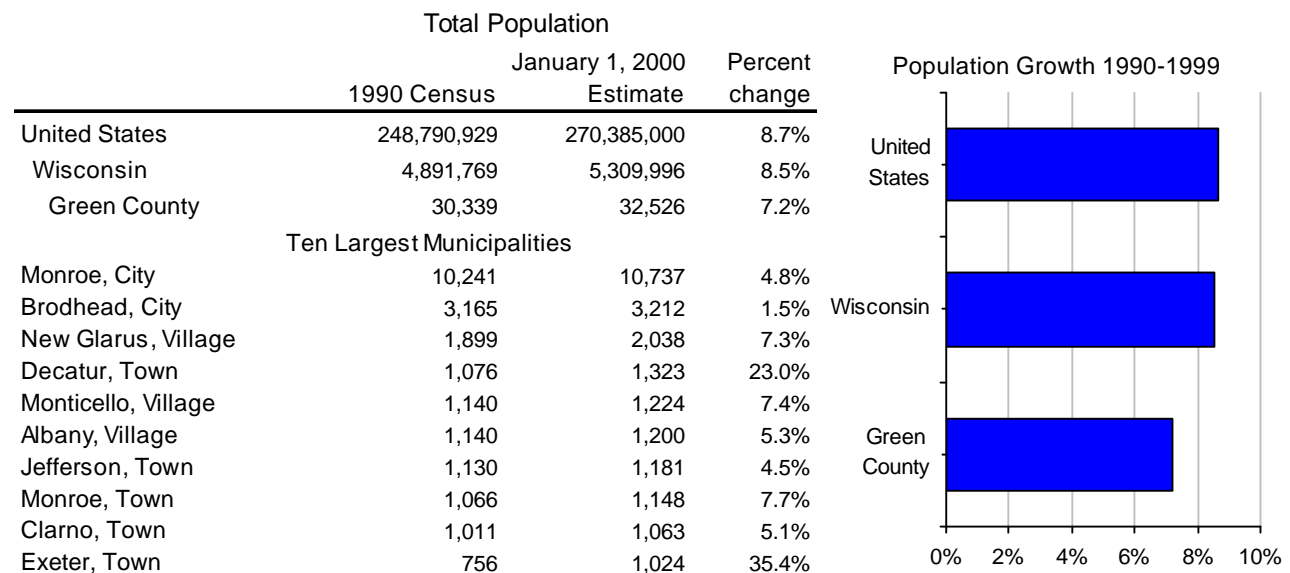
For more detailed information or clarification, please contact your local labor market analyst,
Bill Brockmiller, by telephone (608-785-9337) or email (brockwi@dwd.state.wi.us).

DWD is an equal opportunity service provider. If you need assistance to access services or material in an alternate format, please contact the analyst listed above.

Green County Population and Civilian Labor Force

Green County's population has not grown quite as fast as the state or the nation, although the percentage increase since the last census is larger than some of the counties surrounding Green. A majority of the population increase in Green County has been due to net positive migration into the county, though there is positive natural population growth as well. Population growth in the county might be the result of its proximity to the larger counties of Dane, and Rock, both demonstrating high growth rates. The county's largest municipality, the City of Monroe, has seen its population increase by almost 500 since 1990.

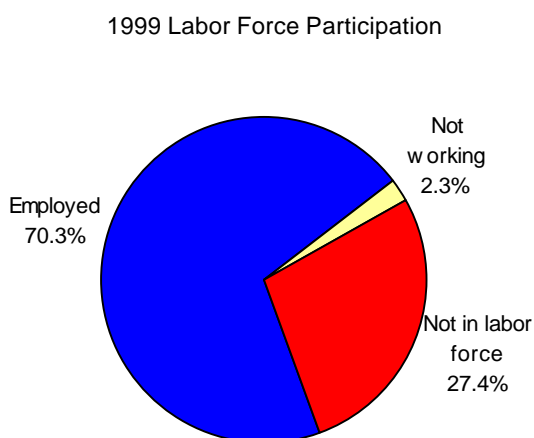
Some of the largest percentage gains in population in Green occurred in towns and villages posited to provide easy access to larger counties. Towns like Exeter (access to Dane County) and Decatur (access to Rock County) can attribute at least part of their population growth to people moving away from larger cities (and often larger property tax levies), while still keeping their employment in those larger cities.



* Green County portion only

Source: WI Dept. of Admin., Demographic Services Center, *Official Population Estimates*, January 1, 2000

The labor force is the sum of employed and unemployed persons who are 16 years old and older. Readers should keep in mind that people who are "not working" includes people who are "unemployed" and people who are "not in the labor force". "Unemployed" does not include all people who are "not working", some people who are not working are not technically unemployed. Examples of people who are not working but who are not unemployed are: retirees, fulltime students choosing not to work, persons with too many employment barriers to enter the work force, persons that have become discouraged and stopped looking for work, or other people who choose not to work or look for work. Persons in a prison, mental institution, or nursing home are not counted as members of the labor force, nor are they counted as unemployed. The pie chart displayed below provides estimates of employed, unemployed and those "not in the labor force" as a percentage of the civilian non-institutional population.



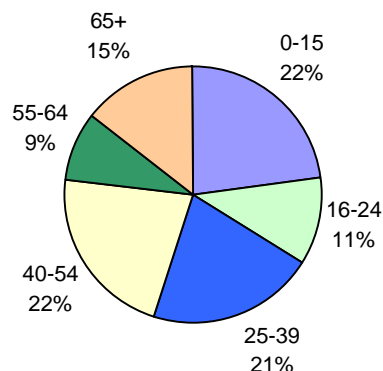
The sum of the employed and unemployed percentages provides us with the "labor force participation rate", used to measure the population's attachment to the labor market. The participation rate in Green County, 72.6 percent in 1999, is slightly higher than the state's (74.4) participation rate. Green County's participation rate is noticeably higher than the national rate (67.1). Green County's participation rate has increased from 70.6 percent in 1990, generally due to employment growing faster than the labor force. The number of employed as a percentage of the civilian non-institutional population aged 16 and older, expressed in the chart to the left as "Employed", is also higher in Green County than the state average. This is also referred to as the employment/population ratio, which measures the elasticity of the labor market; high percentages can lead to labor shortages and may restrict future economic growth.

Source: Estimated from WI Dept of Administration population estimates, Jan 2000, US Census Bureau, and Local Area Unemployment Statistics

This situation is further exacerbated by the decline in age cohorts in which labor force participation is high. The table below displays estimates of population by age; while the age group 25-39 is among the largest, it is declining and the 16-24 age group is only increasing nominally. The largest increase is in the group of individuals aged 40-54, or the "baby boom" cohort, further highlighted by the increase in the median age from 31 in 1980 to 34 in 1990. This demographic shift will have a large impact on future economic trends.

Green County Labor Force Age Population Distribution

| Age Group | Population | | Percent change |
|-----------|-------------|---------------|----------------|
| | 1990 Census | 1999 Estimate | |
| 0-15 | 7,418 | 7,490 | 1.0% |
| 16-24 | 3,274 | 3,492 | 6.7% |
| 25-39 | 7,326 | 6,798 | -7.2% |
| 40-54 | 5,093 | 7,130 | 40.0% |
| 55-64 | 2,593 | 2,877 | 11.0% |
| 65+ | 4,636 | 4,739 | 2.2% |



Source: Estimated from WI Dept of Admin, Demographic Services Center, Official Population Projections 1990-2020 and US Census Bureau

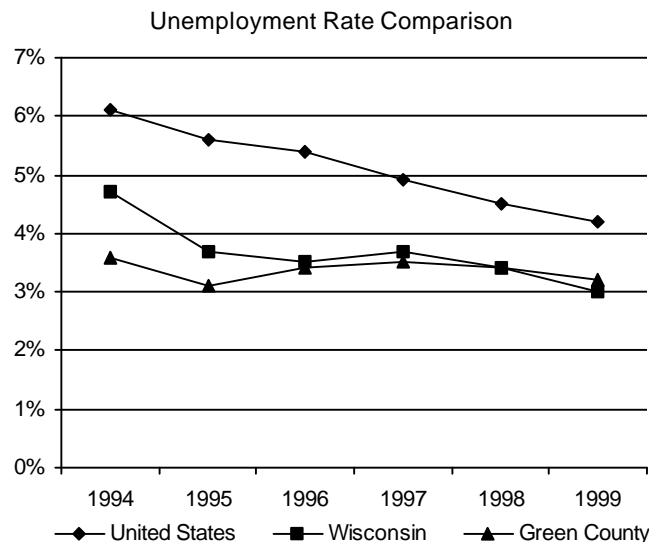
Green County Civilian Labor Force Data

| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 |
|-------------------|--------|--------|--------|--------|--------|--------|
| Labor Force | 18,500 | 18,800 | 18,700 | 18,800 | 18,900 | 18,000 |
| Employed | 17,800 | 18,200 | 18,100 | 18,100 | 18,300 | 17,400 |
| Unemployed | 660 | 590 | 640 | 660 | 640 | 570 |
| Unemployment Rate | 3.6% | 3.1% | 3.4% | 3.5% | 3.4% | 3.2% |

Source: WI DWD, Bureau of Workforce Information, Local Area Unemployment Statistics

Green County, like many counties in the region, has seen unemployment rates decline to record lows. The county unemployment rate has declined from 3.6 percent in 1994 to 3.2 percent in 1999. During the five year time span graphed to the right, the lowest Green County unemployment rate was recorded in 1995, at 3.1 percent.

Green County unemployment rates increased slightly in 1996 and 1997; but remained below state and national rates. Since 1999, rates edged up again in Green County, slipping slightly above the state's average but staying well below the national average. Unemployment rates remain very low in Green County by historical standards.



During the course of a given year, Green County's monthly unemployment rates report both high peaks and low valleys of unemployment. February usually reports the highest unemployment rate for the year. In recent history, Green County's February rate has ran between 4.3 and 4.8 percent. In September Green usually records its lowest rate for the year, recent September rates have ran between 2.8 and 3.2 percent.

This general unemployment rate pattern are roughly similar on a statewide basis. These unemployment rate patterns can be explained by several factors including; Wisconsin's weather patterns, farm growing seasons, Wisconsin manufacturers production schedules, shopping seasons peaks and valleys, and tourist seasons.

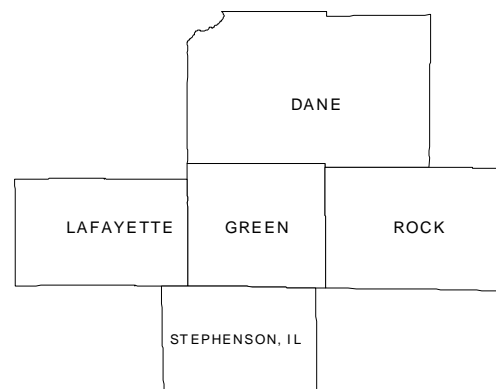
Green's December unemployment rates are usually much lower than the state's, due in part to the major catalog retailer located in Green County.

Green County Commuting Patterns

| | Commute Into | Commute From | Net Commute |
|------------------|-----------------|-----------------|----------------|
| Illinois | 486 | 530 | 44 |
| Dane County | 1,690 | 465 | -1,225 |
| Lafayette County | 299 | 773 | 474 |
| Rock County | 299 | 558 | 259 |
| Elsewhere | 672 | 574 | -98 |
| Total | 3,446 | 2,900 | -546 |

Work within Green County 12,340

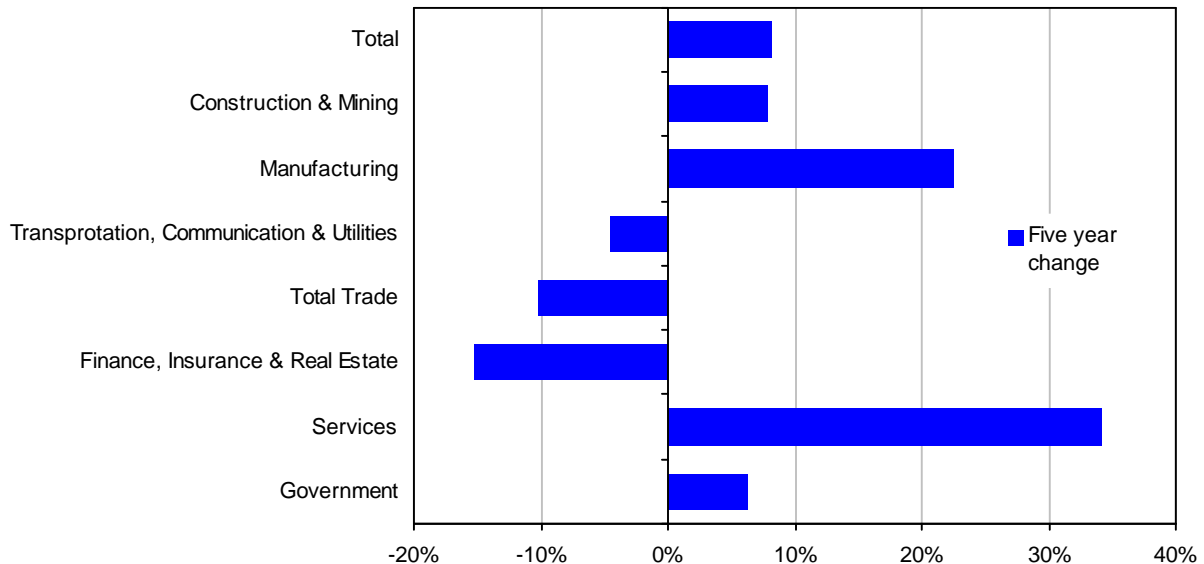
Source: WI DWD, Bureau of Workforce Information. *Wisconsin's Commuting Patterns*, 1994.



As of the 1990 Census, around 40 percent of the workers living in Green County work in the largest city of Monroe, located in the southern part of the county. Monroe is spatially linked to other towns in the county via State Route 69 running north-south and State Route 11/81, running east-west. Though there are no Interstate highways that traverse the county, the expansion of State Route 11/81 in Monroe has facilitated the expansion of commuting into the city.

Most workers commuting from Illinois to Green County generally come from Stephenson County directly into Green County. The fact that there is positive in-migration from Illinois into the county is remarkable considering relatively few workers from Illinois commute into southern Wisconsin. There are a large number of workers who reside in Green County that commute everyday into Dane County. As of the 1990 Census, about 11 percent of the workers in Green County travel to work in Dane County. It is estimated that Census 2000 (commuting patterns are not available from Census 2000 yet) will indicate increased commuting into Dane County, as numbers of smaller towns bordering Dane County have experienced larger than normal growth.

Green County Employment Change by Industry 1994 to 1999



| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | Percent change 1 year | 5 year |
|---|--------|--------|--------|--------|--------|--------|--------------------------|--------|
| Total | 13,936 | 14,407 | 14,112 | 14,447 | 14,980 | 15,082 | 0.7% | 8.2% |
| Goods Producing | 3,429 | 4,104 | 4,267 | 4,213 | 4,224 | 4,137 | -2.0% | 20.7% |
| Construction & Mining | 437 | 470 | 441 | 438 | 456 | 472 | 3.4% | 7.9% |
| Manufacturing | 2,992 | 3,633 | 3,826 | 3,775 | 3,768 | 3,665 | -2.7% | 22.5% |
| Durable | 2,092 | 2,456 | 2,480 | 2,407 | 2,419 | 2,422 | 0.1% | 15.8% |
| Nondurable | 900 | 1,178 | 1,346 | 1,369 | 1,348 | 1,243 | -7.8% | 38.2% |
| Service Producing | 10,507 | 10,304 | 9,845 | 10,233 | 10,756 | 10,944 | 1.7% | 4.2% |
| Transportation, Communications & Utilities | 451 | 464 | 477 | 489 | 444 | 431 | -2.9% | -4.6% |
| Total Trade | 5,077 | 4,680 | 4,031 | 4,149 | 4,331 | 4,561 | 5.3% | -10.2% |
| Wholesale | 1,215 | 701 | 681 | 639 | 617 | 643 | 4.1% | -47.1% |
| Retail | 3,862 | 3,979 | 3,350 | 3,510 | 3,713 | 3,918 | 5.5% | 1.5% |
| Finance, Insurance, and Real Estate | 466 | 426 | 403 | 399 | 407 | 395 | -2.9% | -15.3% |
| Services & Misc. | 2,724 | 2,907 | 3,096 | 3,326 | 3,675 | 3,655 | -0.5% | 34.2% |
| Total Government | 1,788 | 1,827 | 1,838 | 1,871 | 1,900 | 1,902 | 0.1% | 6.4% |

Source: WIDWD, Bureau of Workforce Information, Nonfarm Wage & Salary estimates.

Nonfarm wage and salary employment measures the number of jobs within a county excluding agricultural, military, and self-employed workers. This data measures the number of jobs within the county without consideration of where the job-holder lives. Thus, this information is often referred to as "place of work" data, as opposed to the civilian labor force data which appears at the bottom of page two - which is based on residence. Employment growth over the past half-decade in Green County has been centered in the manufacturing and service industries. The largest declines in employment have come in wholesale trade. Manufacturing employment in Green County increased by about 675 during the five year time period detailed above.

In Green County, as is in the case in much of Wisconsin and the nation, service sector employment has been growing rapidly in the last five years. Service sector employment has added roughly 950 jobs in the last five years, almost a 35 percent growth in service sector employment in Green County. In most locations business services and health services are receiving the lion's share of that growth in service sector employment. In the first quarter of 1999, the largest private employer in Green County was a provider of health services, and the fourth largest was a provider of business services.

The retail trade sector has provided the county modest employment growth over the last five years, anchored by a major catalog retailer of food products. As of the first quarter of 1999, the second largest private employer and the ninth largest private employer in Green County were retailers.

Green County's Largest Industries and Employers

Top 10 Industry Groups

| Industry Group | March 2000 | | Numerical Change | |
|---------------------------------------|------------|------------|------------------|---------|
| | Employers | Employment | 1 Year | 5 Years |
| Health Services | 33 | 1,402 | 80 | 206 |
| Educational Services | 8 | 1,101 | 68 | 117 |
| Miscellaneous Retail | * | * | * | * |
| Eating And Drinking Places | 67 | 1,004 | 88 | 199 |
| Food And Kindred Products | 25 | 735 | -26 | -167 |
| Business Services | 25 | 659 | 230 | 275 |
| Transportation Equipment | * | * | * | * |
| Electronic & Other Electric Equipment | 3 | 600 | -90 | -308 |
| Executive, Legislative, And General | 23 | 550 | 7 | -58 |
| Social Services | 24 | 449 | -9 | 302 |

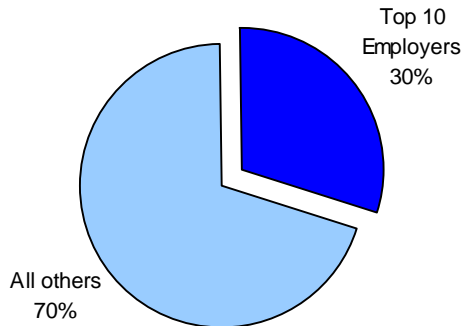
*data suppressed to maintain confidentiality

Top 10 Private Employers

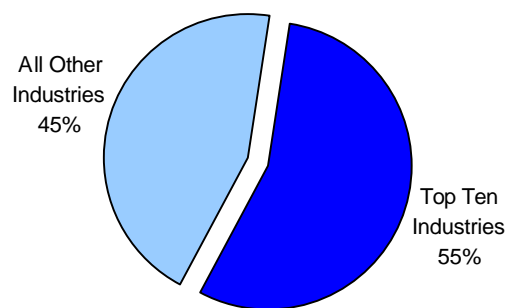
| Company | Product or Service | Size |
|-----------------------------------|--|---------|
| Monroe Clinic | Health Services | 500-999 |
| Swiss Colony | Mail Order Retailer | 500-999 |
| Monroe Truck Equipment | Transportation Equipment Manufacturing | 500-999 |
| S C Data Center | Computer/Data Processing Services | 500-999 |
| Philips Electronics North America | Electronic Equipment Manufacturing | 250-499 |
| Woodbridge | Automotive Parts Manufacturing | 250-499 |
| Iroquois Foundry | Primary Metal Manufacturing | 100-249 |
| Knight Mfg | Industrial Machinery Manufacturing | 100-249 |
| Wal-Mart Associates | General Merchandise Stores | 100-249 |
| Ogden Mfg | Industrial Process Furnace Manufacturing | 100-249 |

Source: WI DWD, Bureau of Workforce Information Bureau, ES-202 file tape, 1st quarter 1999 and LMI benchmark 2000.

Top 10 Private Employers Share of Nonfarm Employment



Top 10 Industry Groups Share of Nonfarm Employment



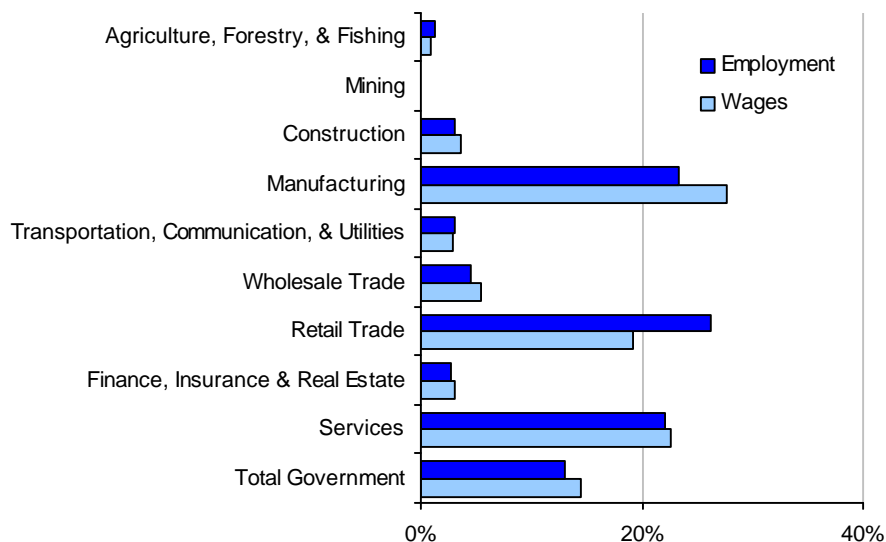
An examination of the largest private employers in Green County reveals a diverse mix, as the top five employers are classified in different sectors - manufacturing, health services, business services, and retail trade. However, a closer look illustrates that service industries are growing faster than many other industry sectors in Green County. In the first quarter of 2000 two of the top five and four of the 10 largest industry sectors are service providing sectors; health services, education services, business services, and social services. This is quite a change from the first quarter of 1998, where just two of the top ten industries were service producing industries.

There were 896 employers operating in the county as of the 1st quarter 2000, the majority of which are classified as eating and drinking establishments. This is not unusual since most of these establishments contain relatively few workers, and their growth is usually based on population and tourism patterns.

Green County Employment and Wages 1999

| | Annual Average Wage | State Average Wage | Percent of State Average | Percent change 1 year | Percent change 5 year | Number of Workers |
|---|------------------------|-----------------------|-----------------------------|--------------------------|--------------------------|----------------------|
| All Industries | \$23,308 | \$29,609 | 78.7% | 5.3% | 17.5% | 14,108 |
| Agriculture, Forestry, & Fishing | \$16,946 | \$21,499 | 78.8% | -1.6% | -10.0% | 175 |
| Mining | * | \$39,968 | * | * | * | * |
| Construction | \$27,286 | \$36,772 | 74.2% | 2.7% | 18.2% | 446 |
| Manufacturing | \$27,529 | \$37,773 | 72.9% | 8.8% | 27.9% | 3,300 |
| Transportation, Communications, & Utilities | \$21,745 | \$34,523 | 63.0% | 0.7% | -5.1% | 444 |
| Wholesale Trade | \$27,925 | \$38,048 | 73.4% | 3.2% | 12.1% | 650 |
| Retail Trade | \$17,013 | \$15,066 | 112.9% | 1.7% | 16.9% | 3,703 |
| Finance, Insurance, & Real estate | \$25,310 | \$37,911 | 66.8% | 13.8% | 25.2% | 391 |
| Services | \$23,718 | \$26,041 | 91.1% | 9.6% | 13.9% | 3,127 |
| Total Government | \$25,585 | \$32,017 | 79.9% | 2.3% | 14.1% | 1,850 |

Total Employment and Wage Distribution by Industry Division



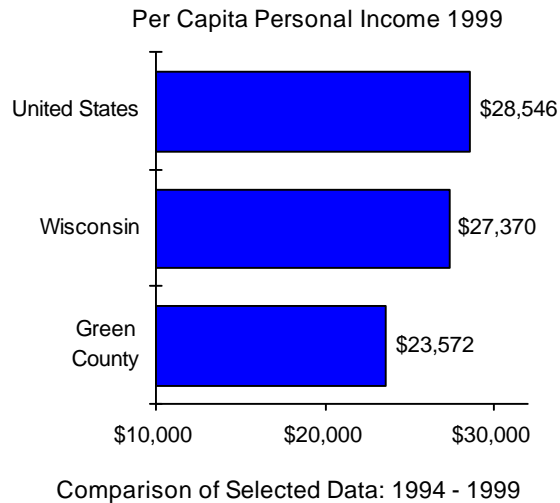
Source: WIDWD, Bureau of Workforce Information, *Employment, Wages and Taxes Due covered by Wisconsin's U.C. Law, Tables 209-211.*

Compared to the rest of Wisconsin, wages paid to workers in Green County are 78.7 percent of the statewide average, down against the statewide average in 1998, when Green County wages were 81 percent of the statewide average. Green County's reasons for being below the state average include the higher than average percent of workers in the county who work in retail trade, where pay is consistently lower wages than other industries. This sector is also more likely to employ part-time workers. Retail trade workers in Green County, on average, earn higher than retail trade workers statewide. However, retail trade wages in Green County are substantially lower than the statewide average for all industries.

The largest percentage increase in annual average wage during the five year time span 1994-1999 was found in manufacturing. The expansion of manufacturing coupled with the increasing demand for workers has led to increases in wage rates for that industry especially for higher-skilled occupations. Nevertheless, these wages are still lower than those paid throughout the state on average. For the larger industries, growth in annual average wages in manufacturing has been strong in the past few years, influenced by wage inflation and labor shortages. While some periods of economic slowing have occurred since 1999, labor shortages will return in the long term to Green County and most other counties in Wisconsin.

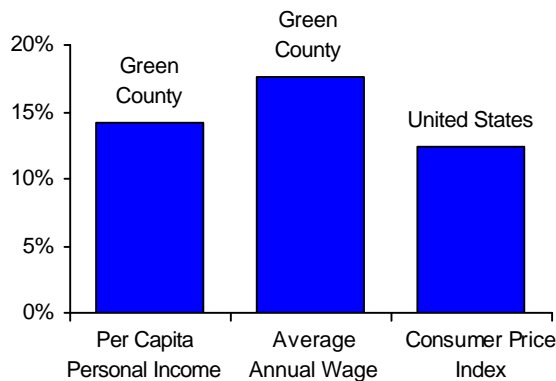
As compared to the statewide industry average, the transportation industry pays the least in Green County, followed closely by the finance industry (FIRE). Both industries are relatively small in Green County. The FIRE industry is dominated by small establishments, mainly banks and credit unions. Occupations within these industries are characterized by entry-level and part-time work; in most cases, wages paid are below average for the state.

Green County Wage and Income Data



Per capita income is total income divided by the total number of residents. Income includes wages earned, dividends from investments, and transfer payments from the government. Per capita income can be influenced by the number of wage earners, average family size, and the median age of residents. It can also affect housing patterns.

Green County's 1999 per capita personal income (PCPI) of \$23,572 ranked 32 of Wisconsin's 72 counties. Over the past five years, Green County per capita income has increased by 14.2 percent and wages earned in Green County have increased by 17.5 percent. Both measures of county income out gained the rate of inflation as measured by the Consumer Price Index.



The PCPI in Green County, with its increase of just 14.2 percent in the last five years, lagged both national and state growth rates by more than 10 percent. The national and state growth rates were 26.4 and 26.1 percent, respectively.

| | Per Capita Personal Income | | | | | | Percent Change | |
|---------------|----------------------------|----------|----------|----------|----------|----------|----------------|--------|
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 1 year | 5 year |
| United States | \$22,581 | \$23,562 | \$24,651 | \$25,874 | \$27,321 | \$28,546 | 4.5% | 26.4% |
| Wisconsin | \$21,699 | \$22,573 | \$23,554 | \$24,791 | \$26,227 | \$27,370 | 4.4% | 26.1% |
| Green County | \$20,644 | \$20,391 | \$21,040 | \$21,675 | \$22,901 | \$23,572 | 2.9% | 14.2% |

Source: U.S. Dept. of Commerce, Bureau of Economic Analysis, Regional Economic Information System.

Selected Occupational Wage Data

| | Mean | Median |
|----------------------------------|----------|----------|
| Cashier | \$ 6.99 | \$ 6.74 |
| Cook, Restaurant | \$ 9.36 | \$ 8.39 |
| Data Entry Keyers | \$ 9.53 | \$ 9.38 |
| Food Preparation Worker | \$ 6.97 | \$ 6.62 |
| Hotel/Motel Clerk | \$ 7.47 | \$ 7.39 |
| Janitor/Cleaner | \$ 9.50 | \$ 9.14 |
| Licensed Practical Nurse | \$ 14.33 | \$ 13.86 |
| Machine Feeder & Offbearer | \$ 9.49 | \$ 9.47 |
| Maintenance Repairer | \$ 13.32 | \$ 13.15 |
| Nurse Aide/Orderly | \$ 9.24 | \$ 9.10 |
| Registered Nurse | \$ 21.21 | \$ 20.21 |
| Telemarketer | \$ 9.93 | \$ 8.69 |
| Truck Driver, Light | \$ 10.32 | \$ 9.97 |
| Truck Driver, Tractor Trailer | \$ 16.72 | \$ 15.72 |
| Vehicle Washer/Equipment Cleaner | \$ 8.83 | \$ 8.24 |

The wages for the selected occupations in this table were reported by employers in non-metropolitan counties in the state who responded to the Occupational Employment Statistics (OES) survey. Employers from all Wisconsin counties participated in the survey but published data was limited to MSAs and a grouping of 60 or so 'balance-of-state' non-MSA counties.

Wages play a critical role in the economy as both workers and employers try to capitalize their worth. The labor shortage has placed additional pressure on wages and those occupations with a mean (average) and median (mid-point) wage relatively close reflect that. Mean wages include both very low and high wages, but as the labor market tightens employers offering low wages migrate closer to the mid-point.

Source: DWD, BWI, 2000 OES wage survey for Balance-Of-State (non-MSA) counties.